

International Bond from Standard Life International

Application form – Trust

Who this form is for

This form is for investment in the Standard Life International Bond by:

trustees of an existing trust (please submit a certified copy of the trust deed with this application)

Or

trustees of a Discounted Gift Plan, Gift Plan, or Loan Plan who are investing a lump sum.

The International Bond can be written on either a Capital Redemption or Life Assurance basis.

If making an additional investment to an existing bond, please use the application form for additional payments (IB31).

Filling in this form

You should remember that your financial adviser is acting on your behalf, not only by giving you advice, but also regarding completing this form.

Please use BLOCK CAPITALS to fill in this form. Do not use correction fluid if you make a mistake. If you need to correct an error, please initial any changes.

All relevant sections of the application form must be complete and applicable documents attached for the bond to proceed. Use the checklist provided on page 2.

We will use the information provided on this application form before taking information from any attached illustration. A copy of the completed application form will be sent to you on request.

Before completing this form, please ensure you have read the Key Features Document and the Key Information Document (KID), and where relevant, the appropriate Supplementary Information Document (SID) or Key Investor Information Document (KIID).

Before submitting this form, please ensure the trust is registered on HMRC's Trust Registration Service (unless exempt) and the Irish Revenue's Central Registration of Beneficial Ownership of Trusts (CRBOT). Please note, the CRBOT registration process is being updated and the Irish Revenue will update their website when it's available. There will be no penalty for non-registration whilst this work is carried out. If you have any questions about trust registration, please consult your professional adviser(s).

The Policy Provisions and Policy Schedule together form the terms and conditions of your product and each policy is evidence of a contract between you and Standard Life International.

The start date of your bond will be the latter of;

- the date we receive the initial payment; and
- the date we receive all the relevant, signed documentation needed to start the bond..

Please send the completed application form, supporting documents and any cheque payments to us at this address:

Standard Life International Scanning Unit Standard Life House 30 Lothian Road Edinburgh EH1 2DH

(Only email documents if requested.)

IB30TRUST 0424



This application is only for use by applicants who are habitually resident in the UK, Channel Islands or the Isle of Man. Please ask your financial adviser if you require any guidance.



Call **0345 300 4273**. Call charges will vary.

If you are using a Standard Life trust deed then the trust is registrable on HMRC's Trust Registration Service. It will also be registrable on the Irish Revenue's Central Registration of Beneficial ownership of Trusts when the service becomes available. If not and you are in doubt as to the trust's registration obligations, please check with the solicitor who drafted the trust.

If you are taking out a discounted gift plan, please only register the trust and send in the application form / funds once you have received your terms of offer letter which sets out your discount.

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Avoiding delays – checklist	
The sections listed below may not need completed for all applications. However, any missing information relevant to <i>your application</i> will cause a delay.	
Trust Deed	
Enclosed, at minimum, a 'wet signature' certified copy of Trust Deed (this will be returned to you)	
The trustees named on the deed match the application form	
For existing trusts, provide any relevant deeds of appointment or retirement along with preceding trust deed	
Part 1 – Financial adviser details	
Standard Life agency code	
Enclosed illustration (new business quote)	
Part 7 – Tax residency self declaration	
Most Trusts will fall into one of the categories listed	
Part 14 – Payment: amount, method and source	_
Source bank account details	Ш
Part 15 – The breakdown of your payment	
Complete this part in full	
Part 20 – Investment Funds	
Citicodes and/or insured fund codes (standardlife.co.uk/adviser)	
Investment total 100% including IB bank account	
Part 24 – Regular Disinvestment	
Confirm the disinvestment frequency	
Part 26 – International Bond Bank Account	
Assign money to the IB Bank Account	
Part 34e and/or 34f – Trustees signatures	
Application Form has been signed and dated on or after creation of the trust	
All trustees have completed the relevant personal details and signed the forms	

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Part 1 – Financ	ial adviser details (to be	completed by your fin	iancial advi	ser)	
Failure to compl	ete the following will dela	y the processing of this a	pplication.		It's important you enter the correct agency
Agency code (MUST be completed)	1	FCA/PRA or other authorisation number			code to ensure you are remunerated as intended.
Agency name Name of regulator Business writer name(s)					
Contact – Who s	should we contact with an	y questions about this a	pplication?		
Contact's name Telephone – Office Email address	@				
Sales Advice					
1. Basis of sale		Whole of m	narket 🗌	Other 🗌	Please place cross in box.
If 'Other', please specify					*Where no advice has
3. I confirm that a only be for advi4. I have supplied	dvice has been given in relation ny adviser charges paid from ice or services given in relation my clients with all relevant describes	this bond will on to this bond. ocumentation, including th		No* No	been given, you confirm you have ensured (and will continue to ensure) the Bond and the underlying investments are appropriate for your client.
instructed my c	cument and relevant investo lients to read all documents rmation if they do not under	carefully before proceeding			
	s part, you are confirming th ness for your client.	at you are taking responsib	ility for subm	iitting	
Signed					Adviser's signature required
Date (DD/MM/YYYY)					
Part 2 – Choice	of International Bond	(to be completed by v	ou)		Please contact your financial adviser if you
	l Redemption Bond		_ife Assurance	e Bond	require any guidance as to the most suitable option.

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If you do not complete Part 3 – Authorising your financial adviser to give investment instructions this section we will on your behalf (to be completed by you) assume that you have given your adviser your I authorise Standard Life International to accept instructions from the financial adviser named authority. You must leave in this form to buy or sell investments under my bond. This will apply until Standard Life receives the cross box blank if you a written instruction from me changing or withdrawing my authorisation. want your adviser to be able to contact us with If you **do not** want to authorise your financial adviser, as outlined above, cross this box: investment instructions on your behalf. Please cross the box to Part 4 – Choice of law (to be completed by you) indicate the law you wish to apply to this bond. You Please note that if you are habitually resident in the Channel Islands or Isle of Man, then should select the same law this section will not apply to you, and the law of England and Wales shall apply to the that applies to the trust. bond. The Discounted Gift Plan is not available with a Scotland England and Wales Northern Ireland governing law of Scotland. Part 5 – Type of Trust (to be completed by you) Please tick the box to indicate the type of bond owner Loan Plan Existing trust Pension scheme Discounted Gift Plan Gift Plan Part 6 – Details of the trust (to be completed by you) If you are applying for a bond in your capacity as trustees, we require each trustee to fully complete part 8 for individual trustees or parts 7, 9, 10 and 11 for corporate trustees. The information you provide will enable us to carry out appropriate identification checks to satisfy money laundering regulations. Name of trust or pension scheme (if any) Date of trust (DD/MM/YYYY) Where is the trust tax resident? Please provide the relevant Taxpayer Identification Number (TIN): Tax residency information Only required if tax resident TIN Country outside of Ireland. You can enter up to five countries. If the trust is tax resident in more than five countries, please photocopy this page.

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Part 6 – Details of the trust (to be completed by you) – <i>continued</i>	
Settlor details where settlor is not a trustee. (Only complete if applicable and only where the	
settlor is a company) Name	Please photocopy this page if more than 2 non trustee settlors.
Address	
Company/LLP Registration number	
Name Name	
Address	
Company/LLP Registration number	
	We need this information
Part 7 – Tax residency self declaration	to allow us to comply with current tax laws.
1. Are you:	Current tax taws.
A financial institution* An actively trading non-financial services business including non-Irish charities/not-for-profit organisations	
A pension fund An investment body	
A pension fund An investment body Please see below definitions:	
7	
Please see below definitions: An actively trading non-financial services business "Actively trading non-financial services business". This includes all actively trading companies or trusts which are not financial institutions, that do not exist simply to hold investments or	
Please see below definitions: An actively trading non-financial services business "Actively trading non-financial services business". This includes all actively trading companies or trusts which are not financial institutions, that do not exist simply to hold investments or receive income. An investment body "Investment Body" will include private trusts or companies, which only exist to hold	
Please see below definitions: An actively trading non-financial services business "Actively trading non-financial services business". This includes all actively trading companies or trusts which are not financial institutions, that do not exist simply to hold investments or receive income. An investment body "Investment Body" will include private trusts or companies, which only exist to hold investments or receive income. A financial institution "Financial Institution" include entities like bank or life insurance companies and professionally managed trusts. Most trusts will either be 'A financial institution' if a	

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Part 8 – Personal details

Please complete all sections where applicable. In each instance, please indicate whether or not the information enclosed is for the settlor and/or trustee and/or trust protector and/or trust beneficiary and/or life assured* (pages 6-10).

- For any life assured who is not also a settlor and/or trustee and/or trust protector and/or trust beneficiary, please complete details on page 10. *Please note that life assured details are not relevant to the Capital Redemption option.
- All trustees will own the bond and all current trustees must provide their full details. If the settlor is a trustee, please remember to complete their details too. Please note that all correspondence will be issued to the first named trustee.
- If settlor(s) is/are deceased, please provide certified copy of either death certificate or grant of probate. You do not need to complete the settlors details in part 8 if this applies.

Tax residency information only required if tax resident outside of Ireland.											
Settlor/Trustee	/Beneficia	ry/Tru	st Prot	ector	1						
Trust Protector	Trust Beneficiary		Settlor	-	and/or	Trustee	· 🗌	and/d	or life a	assure	d* 🔲
Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)			of birth M/YYYY)					Male		Fema	le 🗌
Surname											
First name(s) (in full)											
Nationality											
House number											
Street											
_											
City/Town						Posto	code				
Email address											
	@										
Telephone – (inc. STD code)											
Occupation											
Occupation is required know if the mone of the mone of the mone of Wea	y you're inve	sting is	from yo	ur sala	ary. Plea	se make					
Please provide pe Trusts. Where the the class of person Trusts.	rcentage sha trust benefi	re of t ciaries l	ne trust nave still	for ea l to be	ch trust determ	benefic	ease le	eave b	lank a	nd pro	vide
If you are a benefi of the trust?	iciary, what is	s your s	hare			%					
Class of beneficia	гу										
What is relationsh	ip to the Set	tlor?									



Please make sure you complete all parts of this form. If there are more than four trustees please photocopy this page.

A settlor and/or trustee can also be a life assured -if this applies to you, cross both boxes.

For a Discounted Gift Plan, the settlor or settlor's spouse cannot be a life assured.

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Part 8 – Persor	nal details (Continued)	
Settlor/Trustee	e/Beneficiary/Trust Protector 1 (continued)	
	x resident? Please provide the relevant Taxpayer Identification Number (TIN). he UK it will be your National Insurance Number:	
Country	TIN	
		i
Settlor/Trustee	e/Beneficiary/Trust Protector 2	A settlor and/or trustee can also be a life assured –
Trust Protector	Trust Beneficiary Settlor and/or Trustee and/or life assured*	if this applies to you, cross both boxes.
Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	Date of birth (DD/MM/YYYY) Male Female	For a Discounted Gift Plan, the settlor or settlor's
Surname		spouse cannot be a life assured.
First name(s) (in full)		
Nationality		
House number		
Street		
C: /T		
City/Town	Postcode	
Email address		
	@	
Telephone – (inc. STD code)		
Occupation		
know if the mone	quired for settlors or persons placing money into the trust. You need to let us ey you're investing is from your salary. Please make sure you include this in part alth'. If retired please complete as 'retired'.	
	ficiary, what is your share %	
What is relationsh	hip to the Settlor?	Vou can onter un to five
	x resident? Please provide the relevant Taxpayer Identification Number (TIN).	You can enter up to five countries. If you are tax
For example, in the Country	he UK it will be your National Insurance Number: TIN	resident in more than five countries, please photocop
		this page.

Part 8 – Persoi	nal details	(Contin	ued)					
Settlor/Trustee/Beneficiary/Trust Protector 3							(i)	
Trust Protector	Trust Beneficiary		Settlor 🗌	and/or	Trustee 🗌	and/or life	assured*	A trustee can also be a life assured – if this applies to
Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)		Date of (DD/MM/				Male 🗌	Female	you, cross both boxes. For a Discounted Gift Plan, the settlor or settlor's
Surname								spouse cannot be a life assured.
First name(s) (in full)								
Nationality								
House number								
Street								
City/Town					Postcode			
Email address								
	@							
Telephone – (inc. STD code)								
Occupation								
Occupation is req know if the mone 13 'Source of Wea	y you're inves	sting is Fr	om your sal	ary. Pleas				
If you are a benef of the trust?	iciary, what is	s your sha	are		%			
What is relationsh	nip to the Set	tlor?						
Where are you tax For example, in th						ication Num	iber (TIN).	
Country			TIN					You can enter up to five countries. If you are tax
								resident in more than five countries, please photocopy
								this page.
								J

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Part 8 – Personal details (Continued)		
Settlor/Trustee/Beneficiary/Trust Prote	ector 4	(i)
Trust Trust Protector Beneficiary Settlor	and/or Trustee and/or life assured*	A trustee can also be a life assured – if this applies to
Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev) Date of birth (DD/MM/YYYY)	Male Female	you, cross both boxes. For a Discounted Gift Plan, the settlor or settlor's
Surname		spouse cannot be a life assured.
First name(s) (in full)		3533, ed.
Nationality		
House number		
Street		
City/Town	Postcode	
Email address		
@		
Telephone – (inc. STD code)		
Occupation		
	placing money into the trust. You need to let us ur salary. Please make sure you include this in part te as 'retired'.	
If you are a beneficiary, what is your share of the trust?	. %	
What is relationship to the Settlor?		
Where are you tax resident? Please provide the For example, in the UK it will be your National	e relevant Taxpayer Identification Number (TIN). Insurance Number:	
Country	TIN	You can enter up to five
		countries. If you are tax resident in more than five
		countries, please photocop this page.

to five are tax than five photocopy

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Part 8 – Persona	al details (Continued)			
Life assured 1 – F	or individuals who are life/li	ves assured only		
Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	Date of birth (DD/MM/YYYY)	ı	Male 🗌	Female
Surname				
First name(s) (in full)				
House number				
Street				
City/Town		Postcode		
Life assured 2 – F	or individuals who are life/li	ves assured only		
Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	Date of birth (DD/MM/YYYY)	1	Male 🗌	Female
Surname				
First name(s) (in full)				
House number				
Street				
City/Town		Postcode		
Life assured 3 – F	or individuals who are life/li	ves assured only		
Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	Date of birth (DD/MM/YYYY)	ı	Male 🗌	Female
Surname				
First name(s) (in full)				
House number				
Street				
City/Town		Postcode		

(!)

Please complete all parts in full.

Please note that Life Assured details are not relevant to the Capital Redemption option.

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Part 9 – Corporate Truste	es	
Parts 9 to 11 are for Corporal in the bond go to part 12.	e Trustees Only. If no Corporate Trus	stees are involved
Company/ Limited Liability Partnership (LLP) name Company/LLP Registration number (if applicable) FCA Register Number (if applicable Company address Number		
Street		
City/Town		
County		
Postcode		
Telephone		
Please attach a certified copy o and mark a cross in the box to	f the list of authorised signatories confirm this has been done.	
Where is the company tax resider	nt? Please provide the relevant Taxpayer Id	lentification Number (TIN).
Country	TIN	

ase complete all rts in full.

nore than one rporate Trustee ase photocopy this ge along with page 28.

residency information ly required if tax resident

side of Ireland.

can enter up to five ıntries. If you are tax ident in more than five ıntries, please photocopy page.

April 2024 Page **11** of 32 Part 10 - Corporate Trustees; Tax residency self declaration 1. Are you: An actively trading non-financial services business A financial institution* including non-Irish charities/not-for-profit organisations $oldsymbol{\mathsf{I}}$ An investment body A pension fund Please see below definitions: An actively trading non-financial services business "Actively trading non-financial services business". This includes all actively trading companies which are not financial institutions, that do not exist simply to hold investments or receive income. An investment body "Investment Body" will include private companies or trusts, which only exist to hold investments or receive income. A financial institution "Financial Institution" include entities like bank or life insurance companies and professionally managed trusts. Most trusts will either be 'A financial institution' if a corporate trustee is involved, or 'An investment body'. * Please provide us with your relevant Global Intermediary Identification Number (GIIN) if you are a financial institution. **GIIN**

We need this information to allow us to comply with current tax laws.

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Part 11 – Beneficial owners of Corporate Trustee Company



Please provide names of all principle beneficial owners based on the below definition:

Under Irish anti-money laundering legislation, a "beneficial owner" is an individual who ultimately owns or controls more than 25% of the shares or voting rights of the company, or who otherwise exercises control over the management of the company. The exception to this is in relation to companies with securities listed on a regulated market.

Tax residency information only required if tax resident outside of Ireland.

Corporate Trustee company	– Beneficial owner 1	
Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	Date of birth (DD/MM/YYYY)	Male Female
Surname		
First name(s) (in full)		
Nationality		
House number		
Street		
City/Town		Postcode
How much of the company do y control?	ou own/	%
Where are you tax resident? Ple For example, in the UK it will be		kpayer Identification Number (TIN). mber:
Country	TIN	

If you have an FCA register number and appear on their website we will not need to obtain photo ID or address verification.

You can enter up to five countries. If you are tax resident in more than five countries, please photocopy this page.

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Part 11 – Beneficial owners of Corporate Trustee Company (Continued)
Corporate Trustee company – Beneficial owner 2
Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev) Date of birth (DD/MM/ YYYY) Male Female
Surname
First name(s) (in full)
Nationality
House number
Street
City/Town Postcode
How much of the company do you own/control?
Where are you tax resident? Please provide the relevant Taxpayer Identification Number (TIN). For example, in the UK it will be your National Insurance Number:
Country

If there are more than two 'Beneficial owners of Corporate Trustee Company' please photocopy this page.

You can enter up to five countries. If you are a tax resident in more than five countries, please photocopy this page

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Part 12a – Anti-Money Laundering (AML) Regulations for settlors, trustees, beneficial owners and trust protectors

of Worlth /for Sattles only)

In order to comply with AML regulations, we must verify the identity and address of our customers. To do so we will carry out an online verification check using Call Validate. If the check is successful, no further AML verification is required. Where it fails, we will contact you to ask for evidence of identity and address. This must confirm the customer's full name with no abbreviations or initials, and must match passport/ID and application form details. This does not need to be certified. Transactions on the bond will be restricted until AML requirements are met in full.

Standard Life trusts holding an International Bond are registrable in the UK and Ireland.



Under AML regulations, Standard Life International is obliged to gather information on the origin of the money being invested and on how the wealth leading to the investment was acquired.

In some cases, we may require documentary evidence to verify the information supplied in this section.

Please continue on a separate piece of paper if necessary.

Part 13 - Source or Wealth (10	i Section unity)	
We will not be able to proceed with here is fully completed.	h your application unless the	information requested
Annual income before taxation		
Please indicate which income band a combined income of the bond owner.		olication please state the
Under £20,000	£20,000 to £39,999	£40,000 to £59,999
	£60,000 to £89,999	£90,000 or more
Please tell us how you acquired the n Provide additional details for all com		
Compensation payment	Inheritance	Policy claim/maturity
Sale of company/property	Salary/bonus	Sale of investments
Existing trust	Savings	Other
Additional Details: (must be completed):		
Failure to complete this section ful	-	

Failure to complete this section fully is the most common cause of delay in processing the application. To help: Provide evidence where possible – documents/internet links/etc. Use the free text box to provide as much information as possible.

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Part 14 – Payment: amount, method and source If there is only one The minimum initial single payment is £20,000 or £60,000 if you are setting up a Discounted Gift Plan. For investment in Whole of Market Funds or a discretionary investment manager, the minimum initial single payment is £100,000. in the settlor's sole Some discretionary investment managers and deposit account providers may specify their own minimum investment. tax issues. **Offshore trusts:** Trusts whose trustees are residents of the Isle of Man or Channel Islands, may want to avoid funds passing through a UK bank account. If this applies to you please enquire Please note the amount about alternative bank details. from the amount you **Discounted Gift Plan only:** For a **non-underwritten case** – send the payment with this application. For a **fully underwritten case** – do not send the payment with this application. before investing. We only require the payment after underwriting is completed and we receive confirmation for further details. to proceed. If a payment is received before, then the money will be held in a non-interest bearing account. How much is the payment you are sending us? on faster payments. Cross one of the boxes below to indicate how the payment will be made: CHAPS/telegraphic transfer Cheque Cheques should be made payable to 'Standard Life International', enclose the cheque with this application form and send it to the address shown on page 1 of this form. For building society cheques, please ask the bank or building society to print your name on the cheque to confirm the source of funds. Payments by cheque of £1million or more will be subject to a six working day clearing period. Our bank details for payments are: **HSBC Bank plc (London)** Bank name Account name Standard Life International dac Account Sort code 4 0 0 2 5 0 5 1 2 9 6 7 9 5 number GB44MIDL40025051296795 **IBAN:** Swift code MIDLGB22 Your reference (This is the surname of the first bond owner) Under AML regulations, Paying by BACS or CHAPS/telegraphic transfer – please provide bank details below. NB: Withdrawals/Surrenders will be paid to this account unless otherwise specified is obliged to gather Are the payments being invested owned by the Trustees? No Bank name was acquired. Account holder Account Sort code number If the source account is held in the name of another person, please provide details:

settlor, please make payment from an account name to avoid potential inheritance and income

you invest may be different send us if you want us to facilitate an adviser charge See option 'a' in part 29

Your bank may have a limit

Your bank may charge you for payments by CHAPS/TT.

Standard Life International information on the origin of the payment being invested and on how the wealth leading to the investment

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How often do you want to make recurrent single payments?

Please choose the first date for your recurrent single payments

to be made from the **1-28** of the month (DD/MM/YYYY).

3 months

Subsequent payments will be made on the same date each month or year. The first payment date must be a date after the date you have signed this form.

Monthly

International Bond from Standard Life International **IB30TRUST** Please note the amount Part 15 – Breakdown of your payment you invest may be different from the amount you Total amount of the payment being sent send us if you want us to to Standard Life International facilitate an adviser charge before investing. See option Amount to be paid to your adviser as an initial adviser £ 'a' in part 29 for further charge (see side note) details. Payment amount to be invested in your International Bond (This figure should match the trust deed.) $\left[\mathbf{i}\right]$ Part 16 – Segments Adviser note -You should be aware that: International Bond a minimum amount of £200 per segment is needed seaments and withdrawals calculator available at the payment amount must be divisible by the number of segments and be no more than standardlife.co.uk/ two decimal places adviser/tools the withdrawal amount must match the retained payment figure shown in the Discounted Adviser charges may need Gift Plan trust deed to be rounded down to the number of segments, if split, will impact the beneficiaries of the trust facilitate the requested number of segments. • the maximum segment number is 9,999. We will set your bond up with the maximum number of segments allowable for your payment. Please let us know if you would like a different amount by entering a number in the "Other" box below. Other (please specify) Part 17 – Recurrent single payment (Not available on Loan Plans, Discounted Gift Plans) or Flexible Reversionary Plans Trust investment -You can only make recurrent single payments by direct debit. The minimum limit depends Recurrent single payments on how often you make payments and whether you are also making a lump sum investment are only available if you or have an existing bond. have an existing trust or a Gift Plan. • The minimum limits if you are only making recurrent single payments in a new bond are: £1,000 each month; £3,000 every 3 months; £6,000 every 6 months or £10,000 every year. The minimum limits if you have an existing bond, or are also making a lump sum investment of at least £20,000 are: £500 each month; £1,500 every 3 months; £3,000 every 6 months or £5,000 every year. If you are investing with a How much do you want to invest as a recurrent single payment? discretionary investment manager the minimum

6 months

amount may be different.

Yearly

Part 18 – Recurrent single payment – Direct Debit Instruction (Not available on Loan Plans, or Discounted Gift Plans)

Completion of your direct debit instruction

- 1. Complete this form to instruct your bank/building society to make payments directly from your account.
- 2. If the due date falls on a weekend or bank holiday, your account will be debited within two working days.
- 3. Please ensure that the instruction is signed and dated and the direct debit guarantee is detached before the instruction is returned to Standard Life International.

Instruction to your bank or building society to pay by direct debit



Service user number

2 7 0 2 6 1

Issued by: Standard Life International, 90 St Stephen's Green, Dublin 2

For Standard Life official use only

		This is not part of	of the instruction to yo	our bank or building society.
	ostal address of your ban	k or building s	ociety branch.	
Name				
Building				
number Street				
Street				
City/Town				
Country			Postcode	
Name(s) of				
account-holder(s)				
Bank or Building		Branch		Please refer to the top right hand corner
Society Account No. Reference		Sort Code		of your cheque book.
number				
Your instruction	to the bank/building soc	iety, and signa	ature	
	ard Life International direct			
	t to the safeguards assured ay remain with Standard Lil			
	ny bank/building society.	C IIICCI IIGCIOIIGI	. ana, ii 30, aetaii	3 WILL DE PUSSEU
			Date	
Signature			(DD/MM/ YYYY)	
			Date	
			(DD/MM/	



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The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Standard Life International will notify you 5 working days in advance of your account being debited or as otherwise agreed. If you request Standard Life International to collect a payment, confirmation of the amount and date will be given to you at the time of the request.

YYYY)

- If an error is made in the payment of your Direct Debit by Standard Life International or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when Standard Life International asks you to.
- · You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Banks and building societies may not accept direct debit instructions for some types of account.

Part 19 – Your choice of investments

You can choose to invest in Standard Life insured funds, mutual funds, whole of market funds, the Elevate General Investment Account (Elevate GIA)* and deposit/structured deposit accounts. You can also choose to direct us to invest with a discretionary investment manager who will manage the investments.

*Elevate Portfolio Services Limited trades as Elevate and is part of abrdn group. Elevate Portfolio Services Limited (01128611) is registered in England at 14th Floor, 30 St Mary Axe, London EC3A 8BF and authorised and regulated by the Financial Conduct Authority.

Note that:

If you choose to only invest in Standard Life insured funds, you don't need to allocate part of your investment to the IB bank account. All charges and withdrawals will be applied by cancellation of units from those funds.

If part or all of your investment is to be invested in any type of investment other than insured funds, you **must** allocate part of your investment to the IB bank account.

Please note that we are not responsible for and nor do we guarantee the suitability or tax/regulatory/legal treatment of the bond, and it is your responsibility to ensure it remains suitable for your purposes. We are not authorised to give you tax or legal advice and so recommend you take your own independent advice.

All investment choices are made at your own risk, so it's important to seek the appropriate financial advice.

Standard Life International is not responsible for the performance or solvency of the providers of the investments available through the International Bond.

Please refer to your Key Features Document/Key Information Document for more information.

Please give the percentages that you wish to invest in each investment option. Use whole numbers only and check that the total adds up to 100%. Remember to include any percentage invested in the IB bank account in the total percentage to cover charges and withdrawals.

If the amounts do not add up to 100% ALL the money will be invested in the IB bank account until you give us clear investment instructions for the whole amount.

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Part 20 – Investm	ent funds			Adviser Note:
	the investmen	t choices shown in the enclosed re.		Fund codes are available at standardlife.co.uk/adviser
Only complete this	section if you	wish to invest in insured or mutual funds.		• Fund Code = Insured fund
	_	code – we use this code to identify the fund. Failure to	use the	Citicode = Mutual funds
		mean we have to delay the investment into your B		Whole of market funds – contact your account
	our account ma	' funds we will need the ISIN/Sedol number. When y anager or our Relationship Support Team on 0345 3		manager. Please photocopy this page if choosing more funds.
Payment Type – Single or Recurrent	Fund code/ Citicode	Fund name	£ or %	
One-off payment	KKIG	SL Intl Standard Life MyFolio Managed III EXAMPLE	50%	We are required to supply a
Insured Funds				SID for all insured funds. It i
				important you read the SID before selecting your funds
				before selecting your runds
				A European Union directive
				requires fund managers to produce a Key Investor
				Information Document
				(KIID) for most mutual funds. This document sets
Mutual Funds				out key information about
				the fund including the objectives and risks of the
				fund, what it invests in and its charges.
				It is important that you read the KIID before selecting the fund.
				Where there isn't a SID/KIID
				available, e.g. for certain whole of market funds.
				you should ensure you
				read the relevant investor information document.
				You can get copies of these documents from your financial adviser.
				. manera daviser.
Part 20a – Elevat	e General In	vestment Account		
section you are autho	orising your advi	h to invest in the Elevate GIA. By completing this iser to buy and sell investments via the Elevate ser must agree to the terms set out in Part 34a by		
Elevate Account Nu	ımber	£ or %		
EL				
	o transfer the r	s, these will be held in the IB bank account until you money over to the Elevate GIA. The adviser will ther vestment.		
Elevate Portfolio Ser	vices Limited tr	rades as Elevate and is part of abrdn group. Elevate		

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Portfolio Services Limited (01128611) is registered in England at 14th Floor, 30 St.Mary Axe, London EC3A 8BF and authorised and regulated by the Financial Conduct Authority.

Part 21 – Deposit acco	unts				
Only complete if you wish t	o invest in deposit,	structured deposit acco	unts.		
Account name			£ or	%	
Part 22 – Discretionary				,	
Only complete this section	if you wish us to ap	point a discretionary inv	estment manag	ger.	
Please cross box to indicate	the type of service	e the discretionary mana	ger will be prov	/iding.	
		Discretionary	А	dvisory 🔲	
1. Name					
2. How much do you wish us to send?	£		OR	. %	
If you have been recommer your Financial Adviser has c your adviser if you are unce	ommunicated the				(!)
					Some DIM's may not
Part 23 – Regular Disir	rvestments				facilitate a Standing Order. If not we will contact you
We will set up a regular disi bank account to cover char				ie IB	to discuss allocating money to the IB bank account.
Frequency DIM	Yearly	Half yearly 🔲	Qu	ıarterly 🔲	
Frequency Elevate	Yearly 🗌	Half yearly 🔲	Qu	uarterly 🔲	
We will calculate the require	d amount of the reg	gular disinvestment based	on the frequen	cy selected.	
We will contact the DIM pro	ovider to set up the	e regular disinvestment o	n your behalf.		
Your adviser will set up the	regular disinvestm	ent on the Elevate platfo	orm.		
We will automatically hold I withdrawals until the first r			to cover charge	es and/or	
Note: It is your responsibili charges and withdrawals. I or adviser charges, you sho	f you or your advise	er make any changes to r	egular withdra		

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Part 24 – Phased investment option

You can only invest in insured funds and mutual funds under the phased investment option. The minimum amount for Phased Investment is £10,000.

This option invests your money over a selected period, gradually investing – rather than all at once.

We will invest an equal amount each month, for 3, 6, 9 or 12 months, up to the total amount allocated. The money will initially be placed into the IB bank account and then invested in your chosen funds from there.

The amount will be split into equal payments after any adviser charges and/or product charges have been deducted. Any future charges may affect the final payment to be invested.

If there is not enough money in the IB bank account to meet a monthly payment, we will not make that payment and the phased investment instruction will stop.

It is your responsibility to make sure there is enough money in the IB bank account (part 26) to cover the investment plus any charges.

Amount to be invested under the phased investment option: £

How many eq	ual monthly paym	ents do you want your	investment split over?	
3 mc	onths 🗌	6 months	9 months	12 months
			he same day of the month falls on a bank holiday or a	
each month, p		nent to be made on a solte here. You can chooley /MM/YYYY).		
Phased invest	ment fund choices	S		
Fund code/ Citicode	Fund name			£ or %
Part 25 – Re	egular Disinves	tments		
We will set up	a regular disinves	tment with your DIM F	Portfolio/GIA, to fund the	IB

We may need to round your investment down to the nearest penny in some instances.

Please ensure you have read the relevant supplementary information document (SID) and/or Key Investor Information Document (KIID) before you select the fund

Where there isnt a SID/KIID available, e.g. for certain whole of market funds, you should ensure you read the relevant investor information document.

You can get copies of these documents from your financial adviser.

Please photocopy this page if selecting more funds.



Some DIM's may not facilitate a Standing Order. If not we will contact you to discuss allocating money to the IB bank account.

We will set up a regular disinvestment with your DIM Portfolio/GIA, to fund the IB bank account to cover charges and withdrawals. Please confirm the following:

Frequency DIM

Yearly

Half yearly

V Quarterly

We will calculate the required amount of the regular disinvestment based on the frequency selected.

We will contact the DIM provider to set up the regular disinvestment on your behalf.

We will automatically hold back enough monies in the IB bank account to cover charges and/or withdrawals until the first regular disinvestment is paid.

Note: It is your responsibility to ensure there is enough money in the IB bank account to cover charges and withdrawals. If you or your adviser make any changes to regular withdrawals and/or adviser charges, you should notify us to amend the regular disinvestment.

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Part 26 – Regular withdrawals				
The minimum regular withdrawal payment is £200 or £250 for a Discounted Gift Plan.				
If you want to take regular withdrawals from your bond,				
show the percentage of the total amount invested you want to withdraw each year . **each year**				
Cross the appropriate box to show how often during the year you want to take withdrawals.				
Yearly Half yearly Quarterly Monthly				
On what date do you want your first regular withdrawal to be paid? Payments can be made from 1-28 of the month (DD/MM/YYYY). (Where applicable this must match the date chosen on the trust deed)				
Notes for Discounted Gift Plans				
Percentage amount must be in 0.05% increments. Withdrawals can't start within the first 30 days after your bond is set up.				
Withdrawals are subject to rounding to two decimal places. We will pay your first withdrawal at the next available date as chosen on your trust deed.				
Authority for withdrawal payment				
Please complete the section below if you want to take immediate withdrawals.				
Name of account holder				
Name of bank/ building society				
Branch				
Account number Sort code				
Name of account/ roll number				
IBAN: International bank account number (if applicable)				
Bank SWIFT code (if known)				
Notes				
Withdrawals can't start within the first 30 days after your bond is set up.				
You cannot take withdrawals of more than 10% a year.				
Withdrawals may not be allowed when an active direct debit is in place to make recurrent single payments.				
Any adviser charges taken from within the bond will form part of your 5% annual tax deferred allowance.				
If you have chosen the Capital Redemption option, any withdrawals will result in a proportionate reduction in the Guaranteed Maturity Value.				

If part or all of your money is invested in anything other than insured funds you must hold sufficient money in the IB bank account to cover any withdrawals, charges and investment transactions.

Discounted Gift Plan only

You must take at least 0.5% of the value of the payment you make. This figure and the frequency must match the retained payment details shown in part E and part F of the Trust Deed.

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Part 27 – How you want to pay your adviser

We will use the information you provide in this section to pay your financial adviser. By signing part 34 of this form, you are also:

- agreeing to the payment of the adviser charges documented in parts 29/30/31, and
- authorising Standard Life International to accept all future instructions from your adviser for payment of adviser charges that you have agreed to pay them from your bond, or from your payment.
- If you have chosen the Capital Redemption option, any adviser charges taken from within the bond will result in a proportionate reduction in the Guaranteed Maturity Value.

You do not need to complete the information in parts 28, 29 and 30 if:

- your financial adviser is billing you directly for their services, or
- your financial adviser is not charging you for their services.

1

Please be aware that if there is a difference between the adviser charges requested on the personal illustration and the basis selected on this application form, then we will use the details on this application form.

If you choose option (a) the money will be deducted from the payment that you send us and reduce the amount invested in your International Bond.

Part 28 – Adviser charge for single payments

Complete this section if you will be making a single payment to your bond and you have agreed a charge for advice with your adviser.

Initial adviser charge

You can ask us to deduct this charge in one of two ways:

Option a

deduct the charge from the money you send us **before** the payment is invested in the segments in your bond;

Amount to be paid to your adviser

		•	

Option b

deduct the charge from the money you send us **after** the payment is invested in the segments in your bond.

We recommend that you take appropriate independent tax advice before asking us to facilitate any adviser charges from within your bond as this will form part of your 5% tax deferred withdrawal allowance.

Amount to be paid to your adviser

	£							OR			%
--	---	--	--	--	--	--	--	----	--	--	---

Part 29 – Ongoing adviser charge

Complete this section if you have agreed to pay your adviser a percentage of the bond value or a regular set amount for ongoing advice in relation to your bond. Ensure you keep enough money in the IB bank account to cover these charges.

1. Percentage of bond value



This percentage can be taken once a year or split across a different time period:

Monthly

Quarterly ___

Half-yearly

Yearly

If you have chosen to pay ongoing adviser charges as a percentage of the value of your bond, and that value increases, the actual amount of the ongoing adviser charge will also increase. You may need to check if the 5% tax deferred withdrawal allowance is exceeded in any policy year, as this allowance is based on the payments you make to the bond, not the total value of the bond. This is especially important if withdrawals are taken.

OR

2. Set amount

£	every month £	every year
£	every quarter £	every half-year

When an ongoing adviser charge is selected as a % of the value of your bond, we will round down the calculated amount to the nearest amount that is divisible, to 1 whole penny, by number of segments held within the bond. Any outstanding amounts will be carried over to the next ongoing adviser charge payment.



When adviser charges are paid from your bond, we will round down any amounts selected which are not divisible, to the nearest pence, by the number of segments ('policies') chosen in part 16 of this form.

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Part 30 – Adviser charge for recurrent single payments Complete this section if you will be making recurrent single payments to your bond and have agreed a charge for advice with your adviser (either as one payment or spread over a period of time). Spread payment of regular initial adviser charge (please complete one of the following options) a month for £ months. a year for £ years. £ a quarter for quarters. £ a half-year for half-years.

If you're only making one payment to your adviser, you can enter '1' here – eg £100 a month for 1 month.

(1)

Important, to be read by all parties named on this form.

If you're providing information about another person, we encourage you to inform the individual that you have provided this information and suggest they read our privacy policy to understand how we manage and use their data.

Part 31 – Declaration

Please ensure that all trustees (bond owners) and settlors (where indicated), read the Data protection notice, part 32, and declarations, parts 33a/33b, and confirm acceptance of these declarations by completing and signing parts 34c/34d/34e.

Part 32 – Data Protection Notice

Data Protection Notice – Using your Personal Information

We're committed to maintaining the trust and confidence of our customers. Our Privacy Policy explains how we use our customers' personal information. It explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how you can obtain details of the information we hold about you, and the choices you have about how we use that information. You can get a copy of our Privacy Policy on our website: www.standardlife.ie/privacy

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Part 33a – Accessing the Elevate platform (to be signed by your financial adviser)

The following terms apply where the bond owner selects the Elevate GIA as an investment option. Discretionary Investment Management on Elevate is not automatically available. Please check with us first as to whether an appropriate agreement is in place between us and the relevant Discretionary Investment Manager before seeking to use this functionality on the Elevate platform.

Authorisation

Standard Life International authorises the financial adviser named on this form to open the GIA with Elevate in our name and place investment instructions directly on the Elevate platform, where the bond owner has agreed to this, and on the terms set out below. By signing this section, you accept such authorisation and confirm your agreement to these terms. Please note these terms are supplemental to and should be read with the Intermediary Terms of Business.

In accepting such authorisation, you undertake, confirm and agree that:

- 1. you have all the rights necessary to perform your obligations under these terms;
- 2. you will notify us as soon as you become aware of any breach of these obligations or developments which may (or has) impacted your ability to comply with the terms or applicable laws:
- 3. you will only select a Discretionary Investment Manager if we have agreed to this. You have entered into an agreement with Elevate to access their platform and you will comply with the terms of that agreement. In particular, if you provide the bond owner with read-only access to the Elevate platform, you will ensure that you and the bond owner keep passwords secret and secure and you do not misuse or do anything to compromise the security of the Elevate platform;
- 4. the bond owner has authorised you to place investment instructions on the platform in relation to their bond's investment in the Elevate GIA, and you will immediately notify us of any restrictions on, or removal of, your authority;
- 5. the authorisation we have given you is limited to those powers to instruct the trading of investments (as conferred to the bond owner by us under the Policy Provisions and you will not exceed this authority;
- 6. you will ensure that any investment and dealing instructions you send to Elevate comply with our permitted investment requirements as set out in the Policy Provisions and acknowledge we have the right to override or cancel any investments which may be proposed/made, as well as the right to adjust or refuse any directions the bond owner provides to you;
- 7. you will advise the bond owner as to the suitability of the investments to be held in the Elevate GIA, based on their needs, investment objectives, strategy and risk profile, and in accordance with our permitted investment requirements;
- 8. we are not responsible for the advice you provide or suitability of the investments and do not recommend or provide any warranty as to suitability or performance of the Elevate GIA platform;
- 9. you will manage the Elevate GIA portfolio in good faith and with all due care and diligence;
- 10. all relevant charges have been disclosed to the bond owners;
- 11. the bond owners are aware that adviser charges are not payable from the Elevate GIA;
- 12. you must sell investments when we require money to cover any outstanding charges, withdrawals, cash-ins or as otherwise required by us under the bond Policy Provisions (IB62CRB);
- 13. you will not assign your rights under these terms without our prior written consent;
- 14. we may terminate your authorisation to place investment instructions on the Elevate platform at any time, for example if you cease to be authorised by the FCA or relevant regulatory body.

You agree to fully indemnify and keep us (and the relevant member of the Standard Life Aberdeen group) fully indemnified against any losses or claims arising as a result of the services you perform regarding the Elevate GIA and/or any breach of these terms.

Adviser signature	-	Date (DD/MM/YYYY)

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Part 33b – Declaration to be read and accepted by all trustees

For your own benefit and protection you should read the Data Protection Notice above. If you do not understand any point, please ask us or your financial adviser for further information.

- 1. I/We agree that my/our personal information (including special category data) may be used for the purposes described (subject to me/us exercising my/our right not to be contacted with details of other products and services).
- 2. I/We, the person(s) taking out the bond in which I/we have an interest, agree that the answers given in this form are true and complete to the best of my/our knowledge and belief, and that the answers to any questions which the life/lives assured (where relevant) may be asked in connection with this application, will form part of this application.
- 3. I/We, the person(s) taking out this bond, agree that the details provided match trust records, and any changes in beneficial owner details will result in the trustees updating trust records and informing Standard Life International of the changes.
- 4. I/We (where the bond owner is an individual) declare that my/our principal home is in the UK, Channel Islands or the Isle of Man and that I am/we are habitually resident in the UK, Channel Islands or the Isle of Man.
- 5. We (where the bond owner is a company) declare that the company is incorporated in the UK, Channel Islands or Isle of Man.
- 6. I/We agree to my financial adviser receiving the adviser charge(s) described in parts 28-31 and authorise Standard Life International to accept all future instructions from my financial adviser to pay the charges that I/we have agreed with my/our financial adviser.
- 7. I/We understand that I/We can access the relevant investor information documents (such as KIIDs and SIDs) for my/our chosen funds (where available) through my/our financial adviser or by calling Standard Life International.
- 8. I/We agree that the contract between myself/us and Standard Life International will be governed by the policy schedule and policy provisions.



Important, to be read by all parties named on this form.

Part 33c – Declaration for policyholders* resident outside Ireland

Policyholders resident outside Ireland are required by the Irish Revenue Commissioners to make the following declaration, which is in a format authorised by them, in order to receive payments without deduction of Irish tax.

I/We declare that:

- I/we have read the explanation of the terms detailed in the notes entitled 'Residence Definition' below
- 2. I am/we are/the company is the policyholder in respect of which this declaration is being made;
- 3. I am/we are/the company is not resident or ordinarily resident in Ireland; and
- 4. I/we/the company hereby undertake to inform Standard Life International of any change in my/our/the company's country of residence during the life of the policy.

Residence Definition-Individual

An individual will be regarded as being resident in Ireland for a tax year if she/he:

- 1. Spends 183 days or more in Ireland in that tax year; or
- 2. Has a combined presence of 280 days in Ireland, taking into account the number of days spent in Ireland in that tax year together with the number of days spent in Ireland in the preceding year.

This declaration is authorised by the Irish Revenue Commissioners. It may be subject to inspection by the Revenue. It is an offence under Irish law to make a false declaration

This declaration must be signed by policyholders who are neither resident nor ordinarily resident in Ireland.

Where the policyholder is a company, the declaration must be signed by the company secretary or other such authorised officer.

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Part 33c – Declaration for policyholders* resident outside Ireland (continued)

Presence in a tax year by an individual of not more than 30 days in Ireland will not be reckoned for the purpose of applying the two-year test. Up to 31 December 2008, presence in Ireland for a day means the personal presence of an individual at the end of the day (midnight). From 1 January 2009, presence in Ireland for a day means the personal presence of an individual at any time during the day.

Ordinary Residence Definition – Individual

The term "ordinary residence" as distinct from "residence" relates to a person's normal pattern of life and denotes residence in a place with some degree of continuity. An individual who has been resident in Ireland for three consecutive tax years becomes ordinarily resident with effect from the commencement of the fourth tax year.

An individual who has been ordinarily resident in Ireland ceases to be ordinarily resident at the end of the third consecutive tax year in which she/he is not resident. Thus, an individual who is resident and ordinarily resident in Ireland in 2004 and departs from Ireland in that year will remain ordinarily resident up to the end of the tax year in 2007.

Residence Definition – Company

Prior to Finance Act 2014, company residence was determined with regard to the long established common law rules based on central management and control. These rules were significantly revised in Finance Act 2014 to provide that a company incorporated in Ireland will be regarded as resident for tax purposes in Ireland, unless it is treated as resident in a treaty partner country by virtue of a double taxation treaty. While the common law rule based on central management and control remains in place, it is subject to the statutory rule for determining company residence based on incorporation in Ireland set out in the revised section 23A TCA 1997.

The new incorporation rule for determining the tax residence of a company incorporated in Ireland will apply to companies incorporated on or after 1 January 2015. For companies incorporated in Ireland before this date, a transition period will apply until 31 December 2020.

* Policyholder

In cases where the bond is to be held on trust, either by creating a trust when opening the bond, or by an existing trust, the policyholder is deemed to be the settlor(s) of the trust. If the settlor is deceased the declaration should be signed by their personal representative. In all other cases (including instances where the bond is assigned as security for a loan), the bond owner will be the policyholder.

Before signing your application please review against the avoiding delays checklist on page 2.

Part 33d – Setl	tlors who are not trustees
Name	
Signature >	
Date (DD/MM/YYYY)	Corporate settlor – authorised signatory
Name	
Signature >	
Date (DD/MM/YYYY)	Corporate settlor – authorised signatory

Signature



If there are more than two signatories please photocopy this page.

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Part 33e – Trustees signatures	1
Trustee 1	Note: the Trust deed must be dated before this
Name	application.
Signature >	
Date (DD/MM/YYYY)	Signature
Trustee 2	
Name	
Signature >	
Date (DD/MM/YYYY)	Signature
Trustee 3	
Name	
Signature >	
Date (DD/MM/YYYY)	Signature
Trustee 4	
Name	
Signature >	=-₹ Signature
Date (DD/MM/YYYY)	If there are more than four signatories please photocopy this page.
Part 33f – Corporate Trustee – To be signed by named authorised signatories	photocopy this page.
Authorised signatory	
Name	•
Signature •	Signature
Date (DD/MM/YYYY)	Signature
Authorised signatory	
Name	•
Signature •	Signature
Date (DD/MM/YYYY)	Signature

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Signature

Signature

Part 33g – Trust Protector – To be signed by named authorised signatories
Authorised signatory
Name
Signature >
Date (DD/MM/YYYY)
Authorised signatory
Name
Signature >
Date (DD/MM/YYYY)
Part 33h – Are you a Politically Exposed Person? We are required to identify politically exposed persons (PEPs) under anti-money laundering
regulations, and apply enhanced customer due diligence procedures. A PEP is an individual who is, or has at any time in the preceding 12 months been entrusted with one of the positions listed below: 1. Heads of State, heads of government, ministers and deputy or assistant ministers 2. Members of courts of auditors or of the boards of central banks; 3. Members of the governing bodies of political parties; 4. Members of supreme courts, of constitutional courts or of other high-level judicial bodies, the decisions of which are not subject to further appeal, except in exceptional circumstances; 5. Members of courts of auditors or of the boards of central banks; 6. Ambassadors, chargés d'affaires and high-ranking officers in the armed forces; 7. Members of the administrative, management or supervisory bodies of State-owned enterprises; 8. Directors, deputy directors and members of the board or equivalent function of an international organisation. Are you (or either of you under a joint application), or any other party to this application, now, or previously been a PEP or a relative or close
business associate of a PEP? If 'Yes' please confirm your –
First Name
Last Name
Position Held
Date
Role on the policy (e.g. Life Assured or Beneficial Owner)

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Standard Life International dac is a designated activity company limited by shares and registered in Dublin, Ireland (408507) at 90 St Stephen's Green, D02 F653.

www.standardlife.co.uk/international-bond

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